ePlans Park Construction Permit User Guide

Version 9.2   March 21, 2022

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INTRODUCTION

How to Use This Document

ePlans is a powerful tool that streamlines the plan review process and improves accountability among all of the process's participants. The review process and the software have been set up to maximize flexibility, allowing the Project Manager the ability to utilize as many or as few of the available features as he or she is comfortable with. While each project begins with a standard template, that template can be modified to meet the specific needs of each individual project.

The intent of this document is to provide an overview of the core components of ePlans and to guide all ePlans users through a standard document review process, known as a Workflow. As you gain proficiency with ePlans, you will discover many advanced functions and features throughout the software that are not covered in this guide. While ePlans is the official name of this software, this manual refers to it as ProjectDox as well. The terms are used interchangeably throughout this manual and within the software.

This manual is organized into three main sections: an Introduction, Getting Started, the Workflows. document starts with general information about ePlans,progressing to more specific descriptions of individual functions within the system. Read the Introduction and Getting Started sections before using ePlans to gain a general understanding of the purpose and function of the system. Once you begin to use ePlans, you can refer to the information in the Workflow and Other Functions sections as it pertains to your specific role in the Workflow.

Introduction: This section provides an overview of the purpose and function of ePlans within the Park Development Division's plan review process. It also defines the roles of the various user groups, introduces the Workflow and provides some quick reference tools.

Getting Started: Your computer must be properly configured to run ePlans. Before you begin, consult the Technical Requirements checklist. This section will also guide you through the process of creating a login and password for ePlans.

ProjectFlows/Workflows: The Workflow, now called ProjectFlow is the business process for plan review established by the Park DevelopmentDivision, translated into the customized ePlans platform. This section is divided into four subsections that relate to the four user groups in the Workflow: Project Manager, Consultant, PDCO Team and QAPOfficer. Refer to the subsection for your user group for step-by-step instructions to complete each of your tasks in the Workflow.

In addition to this Comprehensive Guide, there are several other reference documents that provide more in-depth information about ePlans and its various functions.

- While you are inside the ePlans platform, you can click on the **Help(?)** button on the Main ToolBar (see the "Getting Started" section of this guide). There is a lot of useful information in theePlans help site that is not covered in this manual. Use the index or search functions to find instructions on specific aspects of ePlans.
- Throughout the program there are *Learn How* links. Use these to access help on a specific task.

Purpose

ePlans is an online document review, storage and submittal platform created by Avolve Software and tailored for the Park Development Division (PDD) of the Montgomery County Parks Department. ePlans allows the PDD the ability to organize and formulate comments for Applicants based on feedback from the Planning, Design, Construction and Operations (PDCO) Team.

By using ePlans to create online, virtual project workspaces, you enable people from across divisions at different locations, disciplines and schedules to share the same information at the same time, facilitating communication and higher productivity.

Here is what ePlans does to enable online project information management:

- All of the shared project information (documents, drawings, 3D models, annotations, project email, discussion threads, and faxes) is centralized in one location so it is visible, accessible and usable by everyone who needs it.
- The user-friendly interface makes it easy for users at all technical skill levels to leverage the "power tools" in ePlans.
- Permissions and roles-based security restrictions are configured and applied so that only appropriate personnel have access to project information, as well as subsets of that information.
- Using electronic Workflows and eForms, the flow of critical information from one person to the next is tightly controlled in order to maintain schedules and enforce accountability.
- ePlans uses version control to track changes within a document.
- ePlans allows reviewers to compare different versions of submissions, side by side.

- Automation features make sure that when activity takes place in the workspace, those who need the updated information are informed immediately.
- Plan, document and markup viewing tools, online discussions, and group email provide for timely information and a more productive review for the whole team.
- Complete details of all workspace activity are recorded, comprising a complete audit trail for documents, email, annotations and markups, Workflows and forms, access and egress, plus much more.

In summary, ePlans allows the stakeholders in a project to manage information, communication, activity and resources better than manual or conventional means.

ePlans was brought to the Montgomery County Parks Department as part of a collaborative effort with the Montgomery County Planning Department. For the most part, the ePlans platform was tailored to meet the distinct needs of each department in the collaboration. Some shared elements could not be modified to individual department specifications, however, resulting in the occasional appearance of lines of text, instructions or nomenclature that is irrelevant to the Park Development process. Every effort has been made to minimize the occurrence of these elements, and none of them interfere with the Park Development Workflow or the Montgomery County Parks' ability to use ePlans.

Project Roles

This comprehensive guide is designed for anyone involved in the Park Construction Permit process that is responsible for reviewing design and construction documents using ePlans. ePlans users include Applicant, Construction Supervisor, PDCO Team members, Lead Technical Reviewer and External Stakeholders.

Applicant

The Applicant is a person or group who needs a Park Construction Permit issued by the Park Development Division. The Applicant is responsible for filling out the Park Construction Permit Application and uploading his or her documents to ePlans for review by the Construction Supervisor, Lead Technical Reviewer, and the PDCO Team. The Applicant will also receive and respond to comments made by the Construction Supervisor, Lead Technical Reviewer, and PDCO Team

PDCO Team

The Planning, Design, Construction and Operations (PDCO) Team consists of Montgomery County Parks' employees from various divisions whose work programs are directly impacted by a park development project. PDCO Team members will use their individual expertise to review and comment on an Applicant's drawings for accuracy and completeness. The Lead Technical Reviewer is always a part of the PDCO Team.

Construction Supervisor

The Construction Supervisor is the first and last person to review a set of documents before a permit is approved. This role also uploads the As Built Drawings, once they are received from the Applicant.

Lead Technical Reviewer

The Lead Technical Reviewer is in charge of the PDCO Team's correspondence with the Applicant and Construction Supervisor. This ensures clarity with correspondence during the workflow.

External

Any person or agency outside of Montgomery County Parks who has review authority over or is directly impacted by a project is considered part of the External User Group. Although a Project Manager can elect to provide external stakeholders with ePlans access, their review of a Consultant's drawings is usually conducted outside of the Park Development Workflow.

Other

The "Other" user group was created to provide a Lead Technical Reviewer with flexibility when creating his or her project team. This group can be used when assigning users to a project that may participate in a limited number of review cycles, or have special permissions, apart from those granted to other groups.

Workflow Overview

The flow chart below provides an overview of the steps involved in the ePlans Park Construction Permit review. This chart is referred to as the Workflow.
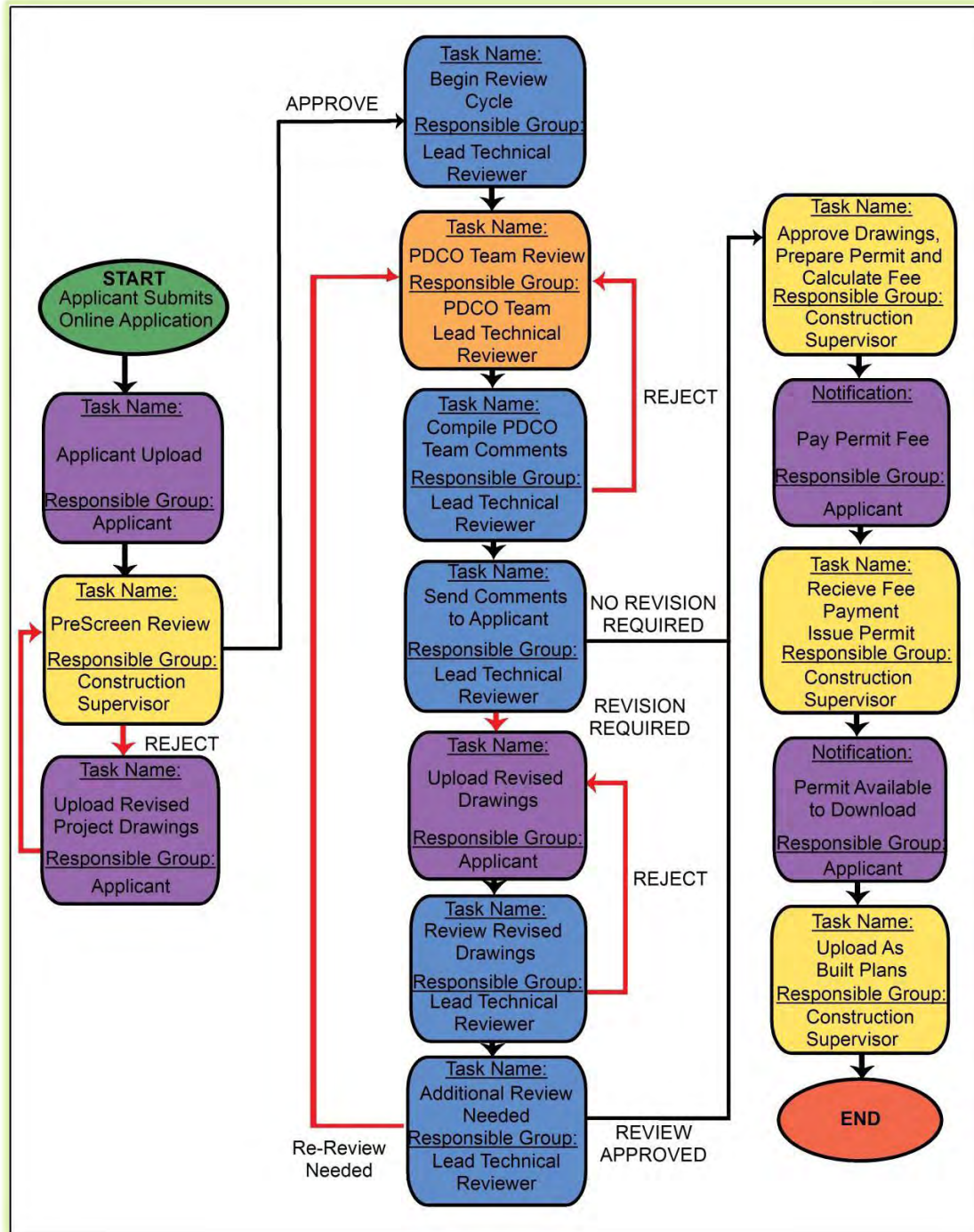
GETTING STARTED

Technical Requirements

ePlans is designed to be a user-friendly program, understandable to anyone who possesses basic internet navigation skills and has a valid e-mail address. Before you begin, you will need to make sure you are using a computer that meets all of the minimum technical requirements necessary to run ePlans.

- A computer with a 32-bit processor and Windows 8 or later installed as the operating system.
- A high-speed internet connection.
- Microsoft Edge, Google Chrome, Safari or Firefox with the pop-up blocker turned off.
  ActiveX components will be installed on Montgomery County Planning and Parks employee's PCs. Once the system is upgraded, you'll need to clear your browser cache and the first time you try to open a document in the new system you may see the following message. Click the "Allow" button and the document should open.

This webpage wants to run the following add-on: 'BravaClientXWrapper ActiveX' from 'Open Text Corporation'.   What's the risk?   Allow ▾ ✕
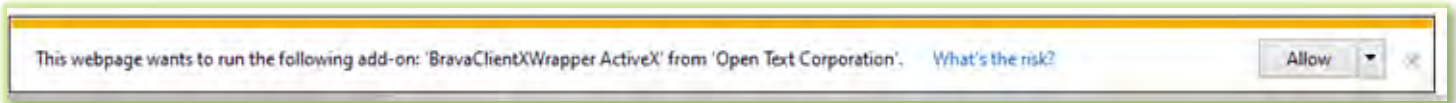
Logging In For the First Time

The first time you are invited to join a project on ePlans, you will receive an e-mail notification, similar to the one below. This e-mail will contain a temporary password and a link to ePlans.

1. Copy the Verification Code that was provided to you in the e-mail. Keep in mind this Code will expire fairly quickly so make sure to complete the reset password task quickly.
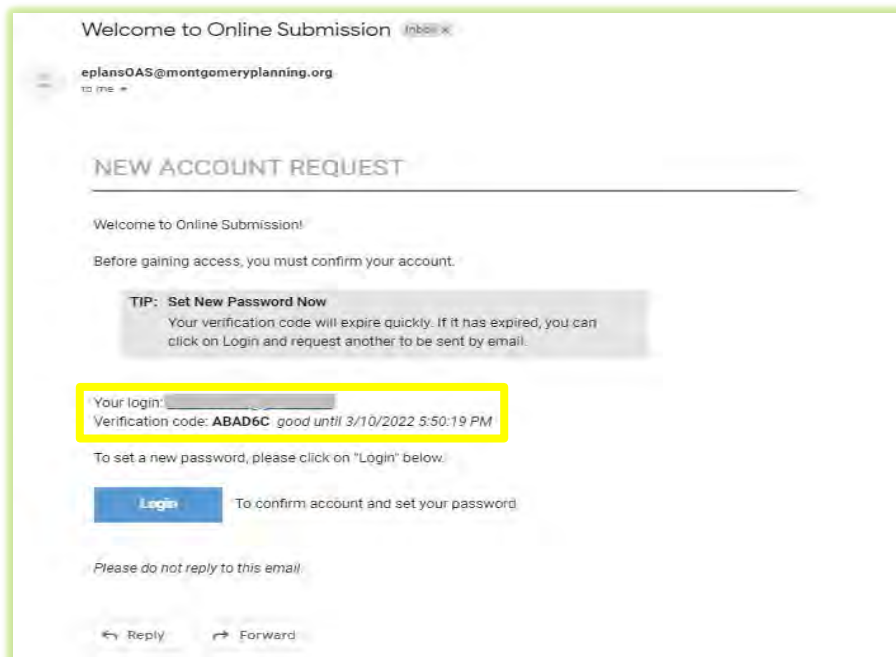
2. Click on the link that says *Login* This will automatically open your web browser and you will be prompted to enter the Verification Code that was sent in the email.

3. Click *Continue* and you will be prompted to enter a new password using the criteria provided in the prompt. If you did not receive a Code or the Code expired, click *Resend Code* and a new one will be sent.

4. Click *Update* This will automatically take you directly to the ePlans main login screen. You can also open your web browser and type in the address http://eplans.montgomeryplanning.org. At this point you can bookmark the page for future use. Alternatively, a link to this page will be provided to you every time you receive an e-mail notification from ePlans.

5.

6. Once you successfully log in, you will be taken to your User Profile where you must enter some additional information about yourself. You can also change your password.

7. Fill in all the required fields (those marked with a red asterisk *), enter your current password and click *Save*. You can return to this screen at any time by clicking on the *Profile* button in the upper left of the Main Tool Bar.

8. After saving your profile information, you will be taken to the Main Projects Screen.

Logging In After the First Time

The second time you log in to ePlans (and every time after that); you will use the password that you entered in your User Profile page. If you ever forget your password, click on **Forgot Password?** below the **Login** button.

- After logging in, you will be taken to the ProjectDox Dashboard. From this screen, you can view all of the projects you have been invited to and their corresponding tasks. These tasks will also be sent to you via automated emails from the ProjectDox ePlans system.

- Clicking on the **Login to ProjectDox** link in the automated emails brings you straight to the ProjectDox Dashboard.

Accessing Projects

When you click on a project number in the *My Projects* section of the dashboard, you will be taken to the Main ePlans project page. From here you can access all of the files that have been uploaded to that particular project, view project information, get project status, run reports and communicate with other members of the Project Team. Clicking **View All Projects** will open the same window but with all of your available projects, active and complete.
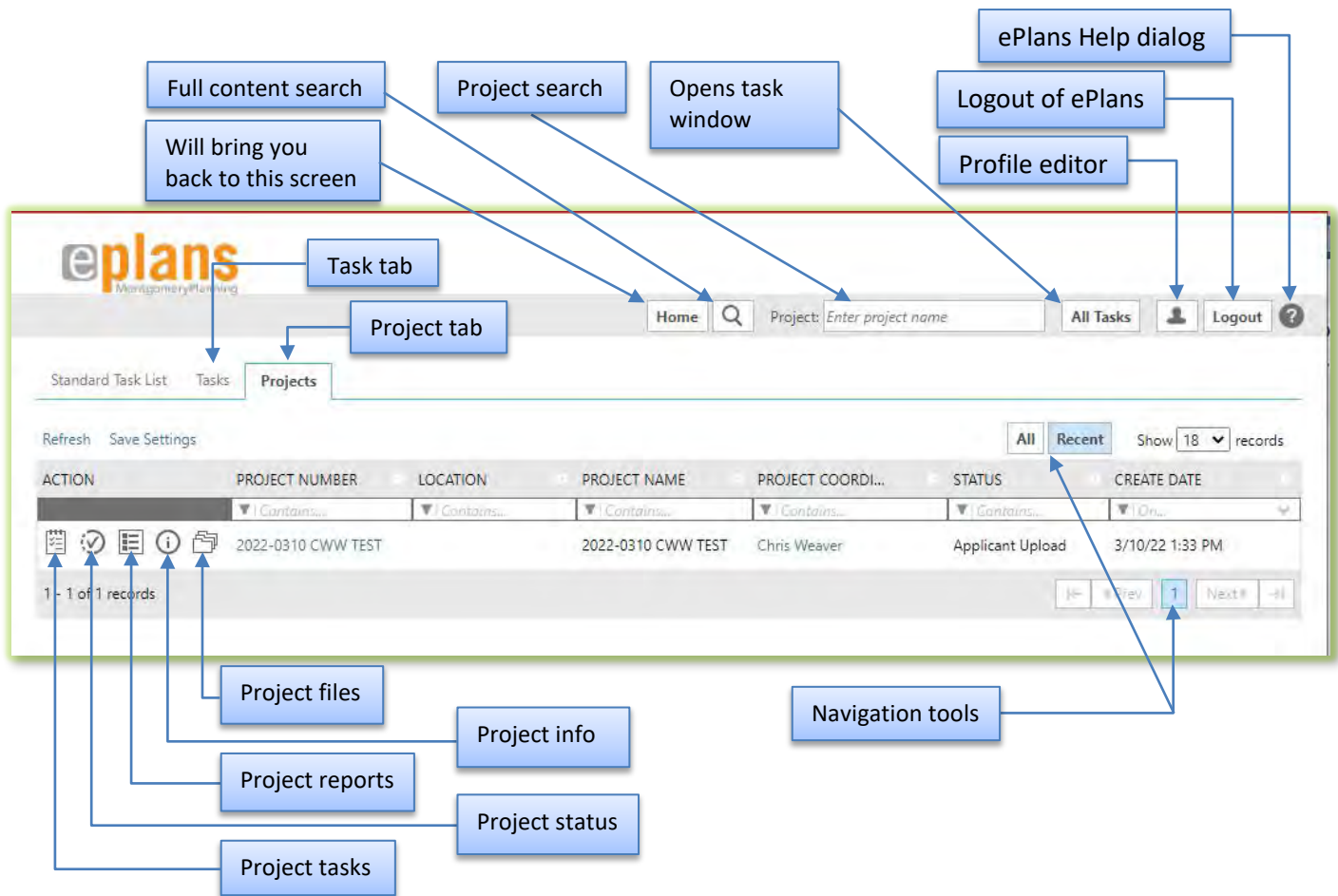
- The **Home** button will always take you back to this main screen.
- The **Content Search** button allows you to search the entire database; files, projects, tasks….
- The **Project Search** window allows you to type in all or parts of a project name to find it quickly if you have multiple projects.
- The **All Tasks** will open the tasks as a pop out window.
- The **Profile** button will take you to your User Profile, where you can edit your personal information or change your password.
- The **Logout** button logs you off ePlans and takes you back to the Login Screen.

- The **Help (?)** button takes you to the ProjectDox Help site. There is a lot of useful information in the help site that is not covered in this manual. Use the index or search functions to find instructions on specific tasks within ePlans such as Uploading files.
- The Task tab will display all your current tasks necessary to keep the workflow moving. Clicking on the task will take you to the eForm for that task; there you will get further instructions for completing that task.

- The Project tab will display a list of your current jobs within ePlans. You can sort your projects by number, name, coordinator, or status. Clicking the project number will take you to that project's main page.

- In the ACTION column under the project tab there are 5 icons. Each is a shortcut to various tools or viewing options. These will also be available from the main project window after you click on your project number.

  - Opens the task list

  - Opens the project status window

  - Opens the project reports window

  - Opens the project information window

  - Opens the file manager window to display all current project documents.

When you click on an individual project number, you will be taken to that project's ePlans page. Here you can access all of the information as in the previous screen, but the items are available in tabs along the top of the window. You also have access to view the current workflow. This allows you to see where in the process you currently are.

- The **Task** tab will display all your current tasks necessary to keep the workflow moving. Clicking on the task will take you to the eForm for that task; there you can get further instructions for completing that task. Clicking on the **Accept** button will also open the eForm for the task. Once you have clicked the **Accept** button once it will then display **Complete**. Clicking on **Complete** will not complete the task, it will only open the eForm for the task again. No task is completed until the **Submit** button is pressed in the eForm.
- A typical applicant task is to upload current or revised drawings or other supporting documents.

- The **Files** tab allows you to browse through the files and documents you have uploaded or see markups from your reviewer. You can also upload more files from this window by clicking on the **Upload Files** button. It functions much like the folders in Windows Explorer. Click on the "+" button at the left to see a list of the subfolders contained in each folder. Click on a folder's name to view the files inside. The text (in parentheses) to the right of each folder name indicates how many files are inside each folder and how many of those files were recently added (folders without any files are empty). If you click on an empty folder, a screen will appear telling you that no files currently exist in that folder.
- Clicking the file names will open each document in a viewer.
- You can copy the file names to your clipboard which will allows you to paste into Word or other text documents.
- Compare files will allow you to select two separate files and then view them side by side for comparison.
- The **Status** tab provides a brief project summary files, time elapsed between tasks, time in with reviewer and number of tasks. You will also be able to produce a Workflow Routing Slip that details the timeline and interaction between applicant and reviewer.
- The **Info** tab displays basic project information, entered by the Project Manager, is provided here. For mostprojects, many of these fields will be blank, as the information does not apply to Parks.
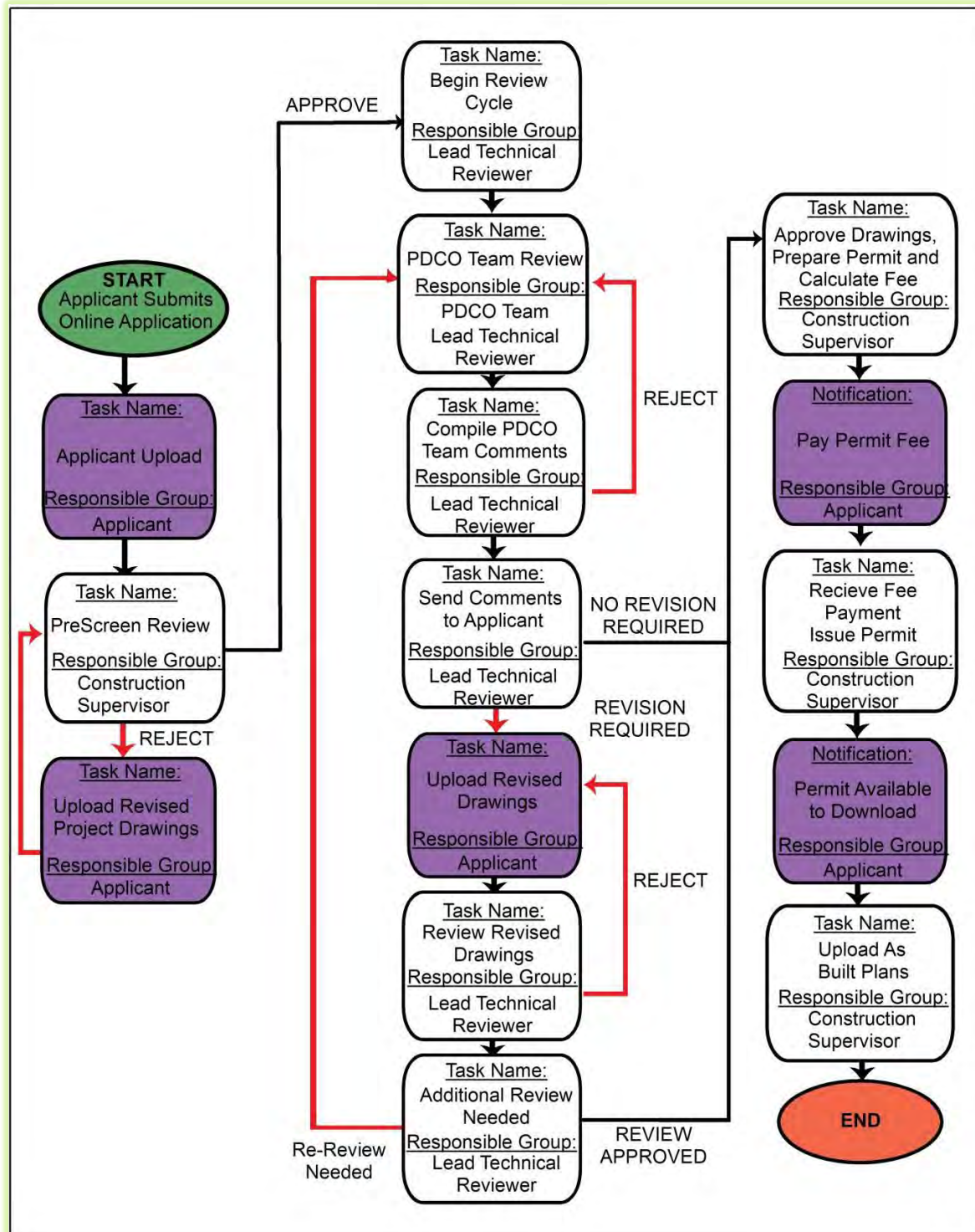- The **Reports** tab allows you to generate several types of reports for a project.

WORKFLOWS:
Applicant

Montgomery Parks

Workflow

This section describes all of the Applicant's tasks within the Workflow.

Task Name: Fill out Application

Before an applicant is issued a Park Construction Permit, the applicant must fill out the necessary information using an online application. The procedure and application form can be found in the link below:

Park Construction Permit Procedure Document (Including Application Form)

Task Name: Applicant Upload

 Once the Park Construction Permit Application is successfully submitted, a project will automatically be created in ePlans and you will be sent an e-mail inviting you to join the project. If this is your first time logging on to ePlans, you will need to follow the steps in the Getting Started section before continuing. As the Applicant, your first task is to upload your drawings to ePlans for review. All subsequent emails beyond your original project invitation email will look similar to the one shown below. Click **Project Access** to log in and be sent directly to the project task tab.

1. A new task will appear in your Task List. Click on the link entitled **Applicant Upload** or press the **Accept** button to open the eForm.
2. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required for this task in the Workflow.

- Clicking on the **Upload Drawings** or **Upload Documents** buttons will open another dialog box in which you will be able to either browse for files or drag and drop files from another open file explorer.
- Click on the *Learn How* link to open ProjectDox help videos for the particular task. This link can be found in several different dialog boxes throughout ePlans.

- As you load files into the upload area, they will be color coded.
  - Orange indicates files that are new to that particular submission folder
  - Blue indicates files of the same name but a different version. ePlans automatically versions the files. All file versions are retained.
  - Red indicates files of the same name but have no changes. These files will be ignored and not uploaded.
- Press the **Start Upload** button to initiate the upload and you will be returned to the Applicant Upload task eForm.
- The folder structure will now show up in the *Uploaded Files* area. Once the files and/or documents have been uploaded, proceed to Step 2 and "check" the *Upload Task Complete* box.
- After you have checked the box, the **Submit** button will activate.
- If you are ready to send the documents to the reviewer, press the **Submit** button. The files will

be sent to the reviewer and the dialog box will close automatically. The task will not be complete until you press the **Submit** button.

Task Name: Upload Revised Project Drawings (Following PreScreen Review)

The Construction Supervisor will review the drawings you uploaded to make sure they are ready to be sent to the PDCO Team for their review. If the Construction Supervisor finds any issues that will prevent a complete PDCO Team review, he or she will reject the drawings and request that you revise your drawings and upload them again. If your drawings are approved on the first submission, you will skip this task.

1. You will receive an email similar to the original Upload email. Click on **Project Access** to login to ProjectDox and be taken directly to your tasks.
2. A new task will appear in your Task List. Click on the link entitled **Upload Revised Project Drawings.**

Upload Revised Project Drawings Task Assignment

Attention Chris:

Your plan review submission for Project: **2022-0315 PermitTest1** has been reviewed and corrections have been requested. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and/or documents are ready for re-submittal, please Login to ProjectDox and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and/or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested
- Please make corrections within 180 days of this notice to prevent your application from expiring.

Project:	2022-0315 PermitTest1
Description:	test
Task:	Upload Revised Project Drawings
Assigned by:	Chris Weaver
Project Access	Login to ProjectDox

Go straight to your task list

If you do not have access to the specified folder, please contact the Project Administrator.

Please do not reply to this email.

3. A similar eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required for this task in the Workflow.

UPLOAD REVISED PROJECT DRAWINGS

Task Information

Project Name:	2022-0315 PermitTest1
Project Description:	test
Coordinator:	Chris Weaver
Workflow:	Parks Permit Workflow
Current User Login:	
Task Due Date:	3/28/22 8:07 AM

STEP 1 of 4: Respond to all checklist items

Resolve Review Comments ?

Unresolved Comments:	0
Info Only Comments:	0
Files with Markups:	0

Plan Review:	Review Comments	Export to Excel	Import Excel Responses	Learn how
	Review and respond online.	*Review and respond in Excel , then upload your responses.*		

Open online help

- Click **Review Comments** button to open a separate window that will contain a matrix of any review comments. You can respond to the comments directly in this window or if there are several comments you can click the **Export to Excel** button. This function will create an excel spreadsheet with all of the comments and a location for your responses. Save this file to an appropriate location on your computer system and respond to the comments directly in the spreadsheet.

Comment list and status

Your responses

Dept: Show All	Status: Show All	Response: Show All	Search: Enter keyword	Close Window
Type: Show All	Cycle: Show All	Time: Show All		

Refresh | Learn how

		Add Comment / Ask Question	Please enter your responses ?

Ref.# 1	Construction Supervisor		Chris Weaver	3/21/22 10:07 AM	No response required.
Info Only	Leave 4"x 4" area at bottom right for stamp.				
Checklist Item					

Written comment

Ref.# 2	Construction Supervisor		Chris Weaver	3/21/22 10:07 AM	No response required.
Info Only	Submitted drawings must include scale.				
Checklist Item					

Thumbnail of changemark

Ref.# 3	Changemark note #01	PDCO Group	Chris Weaver	3/21/22 10:19 AM	Cycle 1	Type your response here.
Unresolved		002_CFP_C301_Grading Plan.pdf				
Markup		Regrade driveway and remove trench drain.				

Opens drawing with changemarks

Ref.# 4	Changemark note #02	PDCO Group	Chris Weaver	3/21/22 10:19 AM	Cycle 1	Type your response here.
Unresolved		002_CFP_C301_Grading Plan.pdf				
Markup		Verify Pipe Diameter				

- Comments are referred to as Changemarks in the system. By clicking on the Changemark thumbnail it will open a larger window with just that Changemark shown. Clinking the drawing name in the list will open the whole sheet with all of the Changemarks displayed as well as a few other tools.
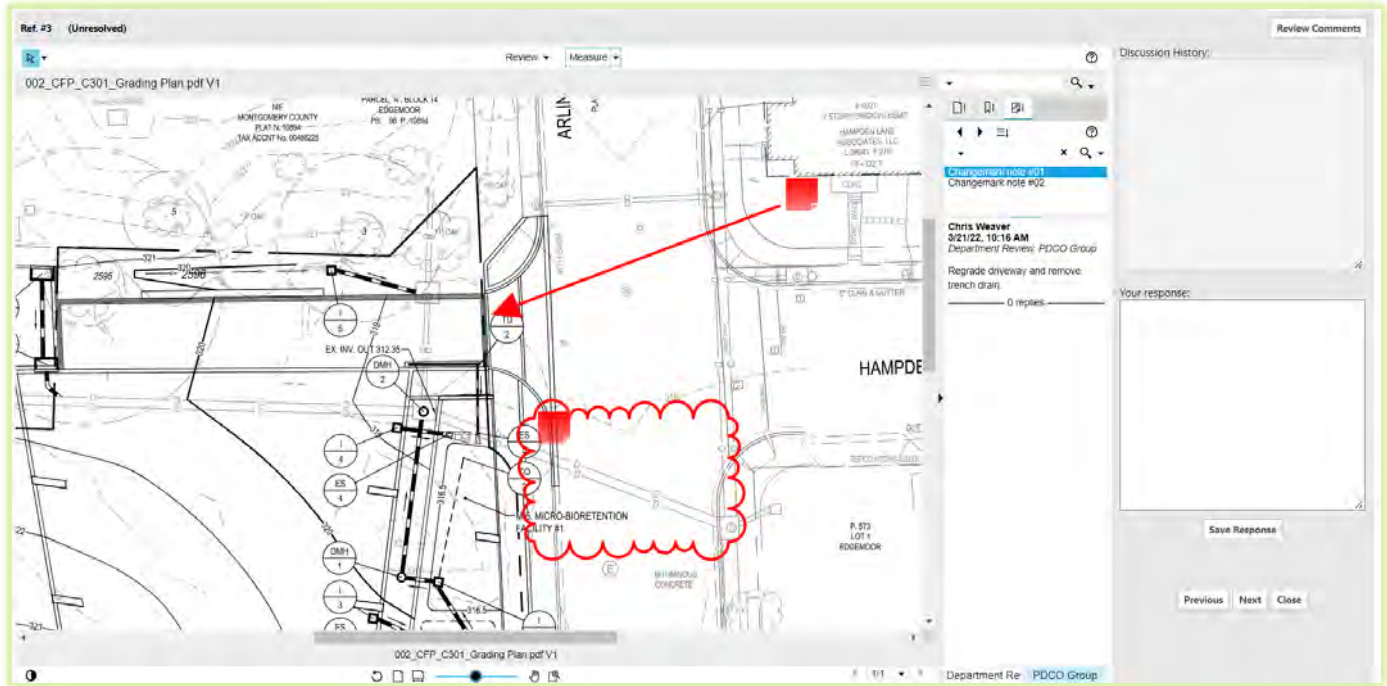
- You will be able to respond to the comments directly in this window and step through them, one by one. Be sure to click **Save Response** before closing this window. Closing the window will bring you back to the full comment list. You can then close that window and you will be brought back to the eForm task window.
- If you chose to respond to the comments via the downloaded Excel spreadsheet you can open this eForm again and click the **Import Excel Responses.** This will allow you to upload the revised excel spreadsheet directly into ePlans, adding your responses to the matrix.
- You can add a comment or question for the reviewer by opening the **Review Comments** and click the **Add Comment / Ask Question** button.

- In Step 2 of 4 you can upload your revised files if necessary. You are encouraged to upload files with the same name to allow for versioning. If you do need to upload new files, click on the *New Files* tab. This will bring you to the standard upload buttons from the original upload task.
- In the *Versioned Files* tab you have two options:
  - o Yes (Files are named exactly as before)
  - o No (Files have different names as previous versions)
- Clicking *Yes* brings you to the standard upload buttons from the original upload task.
- Clicking *No* will open another dialog box allowing you to link a new file to a previously uploaded file. The system will automatically version the old file with the new one.
- Clink the *Learn How* link to open ProjectDox online help for this task.
- Once you have uploaded all necessary files and addressed all of the comments, if there were any, move to step 3 of 4 and "check" the confirmation button.
- After this box is checked the *Submit* button will activate and you can press it to submit all of the files and comment responses back to the reviewer. If you have not addressed every comment you will get a warning and the *Submit* button will not activate. There must be some response to every comment.
- The Construction Supervisor will receive notice of the revised drawings, documents and comment responses and review again to ensure completeness then forward the package to the PDCO group for formal review.
- Once the PDCO group has reviewed the submittal they will send the package back to the Lead Technical Reviewer who will then route the review comments back to you. You will receive an email as before describing the task and providing a link for you to access the task.

You can also access your files at any time through the Files tab from the ePlans project home screen.
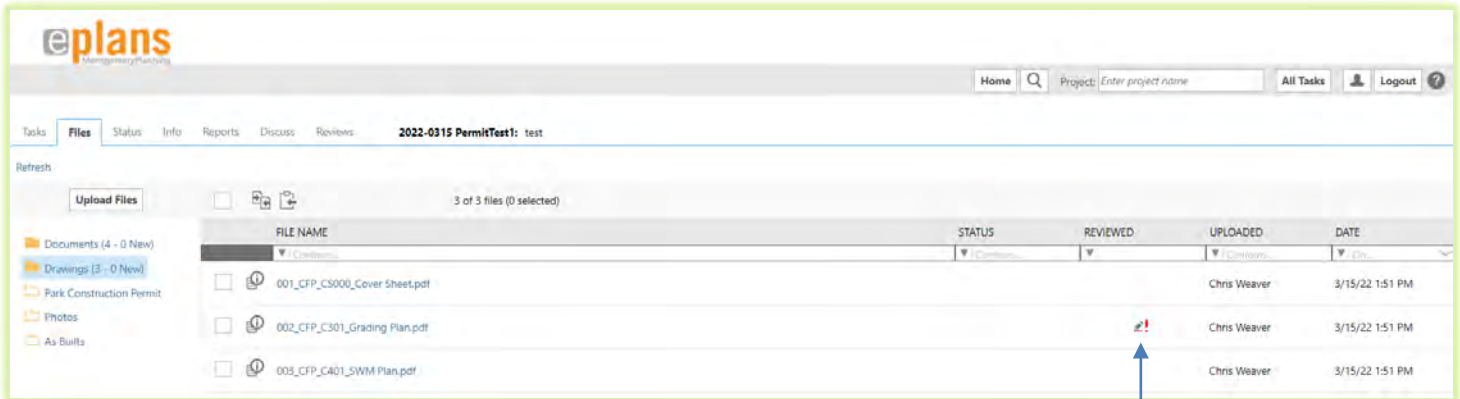

Indicates a Changemark

- Clicking on the file name will open the sheet in a full window.
- Clicking on the Changemark indicator will open a second dialog box where you can choose to view the Changemarks. This window will be similar to the review window you get in the comments matrix as shown above but you do not have the opportunity to respond to comments in this viewer.
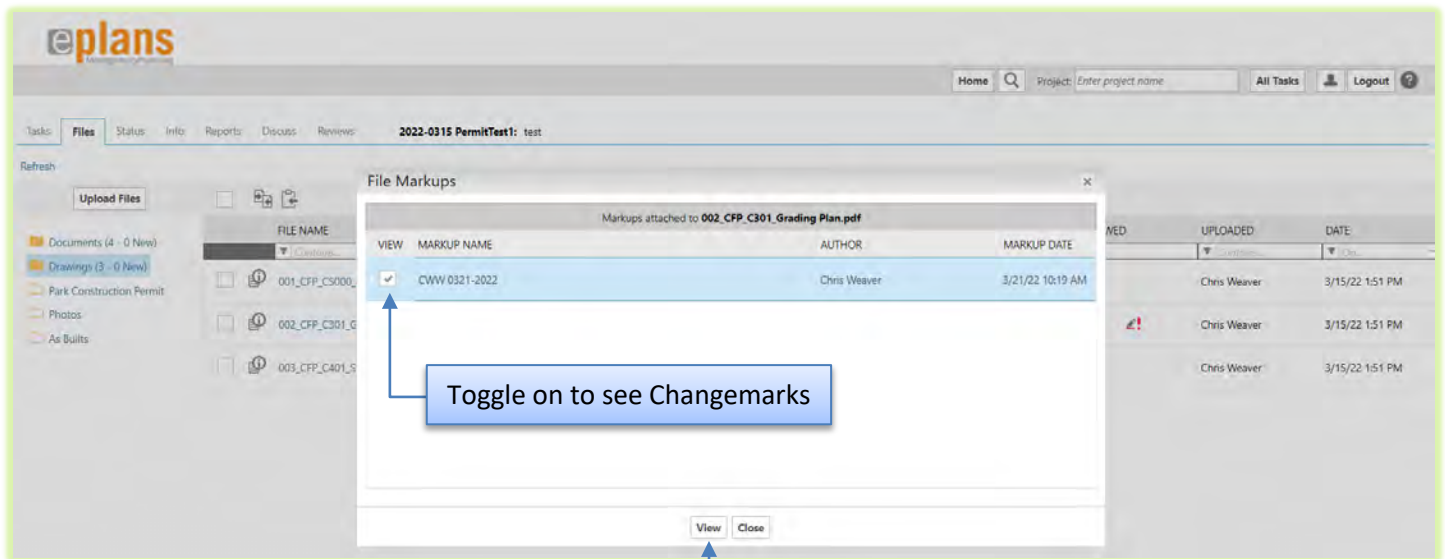
Toggle on to see Changemarks

View sheet with Changemarks
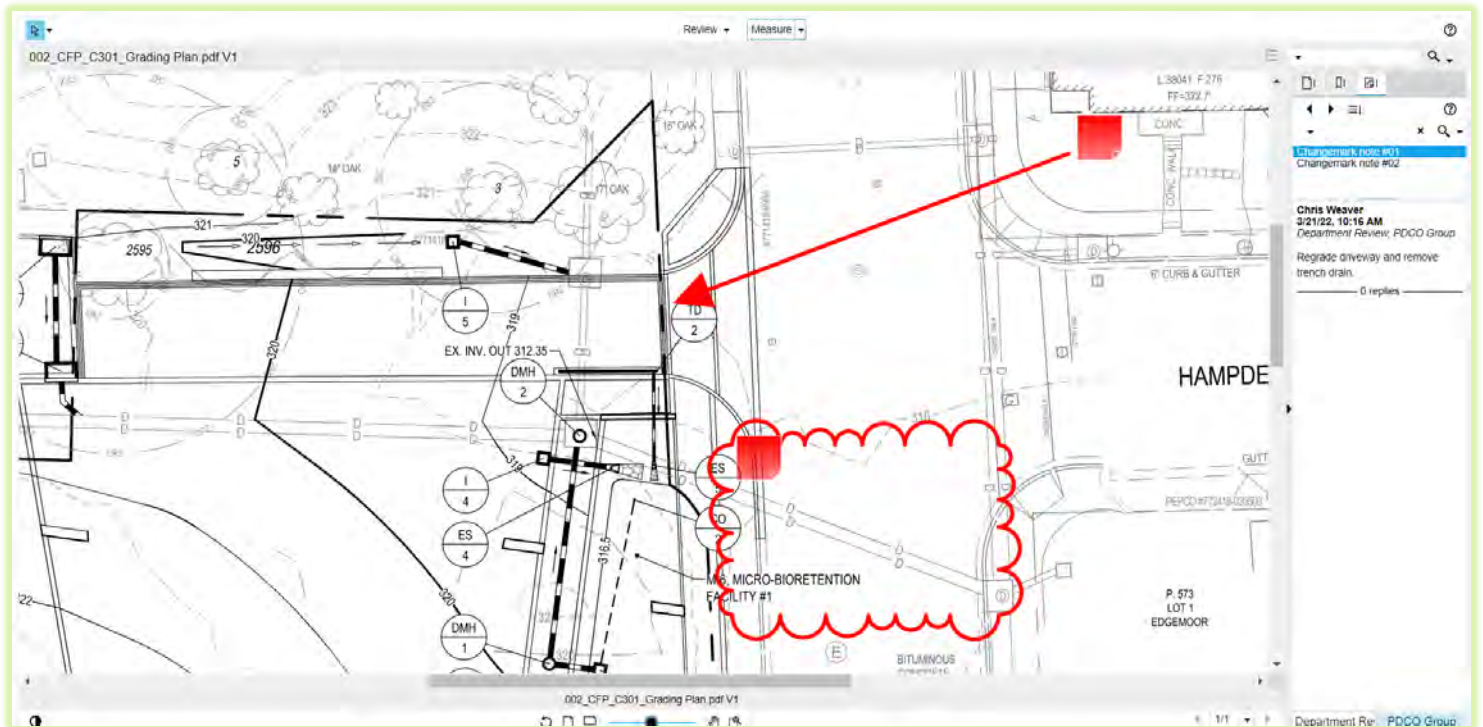
Task Name: Upload Revised Drawings (Following PDCO Review)

Once the Lead Technical Reviewer reviews and compiles all of the PDCO Team comments, you will receive an e-mail notifying you that revisions need to be made to the drawings if necessary. The Lead Technical Reviewer will also provide you with a Resubmit Due Date.

1. A new task will appear in your Task List. Click on the link entitled *Upload Revised Drawings* and follow the same steps as above.

2. Once you have reviewed the comments from the PDCO group, addressed all of the comments and uploaded revised drawings if necessary, proceed to Step 4 of 5, read and "check" all of the required boxes then click *Submit* on the task eForm. You are now finished with this task, and it will disappear from your Task List. This task will berepeated as necessary until the Lead Technical Reviewer accepts the drawings.

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Notification: Pay Permit Fee

At this step, the Applicant will receive an email with the fee of the permit and the contact information of the Construction Supervisor. Calculate the Fee Amount and Bond Amount from the email and contact the Construction Supervisor to get further instruction for payment. Below is an email notification sample:

Fee Payment Task Assignment

Attention Test:

Your plan review submission for Project: **2014-038** has been reviewed and is approved. However, you will need to pay a fee of **$50** and a bond amount of **$100** before the permit can be issued.

Please contact the Construction Supervisor to pay the fee.

Please do not reply to this email.

Montgomery Parks

Notification: Permit Available to Download

At this step, the Applicant will be able to download the stamped drawings and the Park ConstructionPermit. You will receive an email notification. *Sample of notification is below:*

- Click **Project Access** to login to ProjectDox and go directly to your project home screen.
- Click on the *Files* tab to view the directory structure.

- Highlight the *Park Construction Permit* folder, check all the documents that you wish to download in the folder and click on the download button to save them to your computer. This concludes the task.